



**CARL  
ABRC**

**OCUL**  
Ontario Council of University Libraries



**Scholars Portal**  
A Service of the Ontario Council of University Libraries  
Un service du Conseil des bibliothèques universitaires de l'Ontario



**UNIVERSITY OF TORONTO  
LIBRARIES**

## **National Shared Repository Infrastructure Service Development Project**

### **Call for Early Adopters**

After separately investigating the feasibility of scalable, shared institutional repository infrastructure, the Canadian Association of Research Libraries (CARL) and the Ontario Council of University Libraries (OCUL) have agreed to work together in the development of a hosted national repository service ('Scholaris'). The University of Toronto Libraries (UTL) will act as the service provider through Scholars Portal.

The service will use the open-source repository software DSpace, and will be available to CARL and OCUL member institutions, as well as eligible non-member research organizations across Canada, starting with an early adopter program of a limited number of institutions.

Scholars Portal will provide reliable technical hosting, security measures, monitoring, and technical support in line with other services currently being offered, with the potential for integrating digital preservation and other services/workflows, as beneficial to participating organizations. A governance and financial sustainability plan will be developed by CARL in collaboration with regional consortia and the Shared Repository Infrastructure Advisory Committee (SRIAC). CARL will also support some expert groups to provide technical and operational input in key areas.

At this stage, Scholars Portal is looking to work with a few early adopters who are ready to test, use, and help facilitate the broader development of this national service. If your institution may be interested in taking part, please see below for criteria and next steps.

### **Structure of Early Adopter Program**

We are looking to identify 2 cohorts to participate successively as early adopters to be hosted on shared infrastructure. The work is foreseen to include: migration, service and workflow development and documentation, identification of resources (financial and human) needed for production service, and participation in other aspects of the project (e.g. developing Community of Practice, Governance and Finance models).

### **Criteria for choosing Early Adopter Institutions**

To ensure the service we develop can accommodate a range of use cases, we are seeking Early Adopters from the following categories:

- No existing repository (2-4 institutions spread over the cohorts)
- Small existing DSpace repository (2-4 institutions spread over the cohorts)
- Large existing DSpace repository (one in first cohort)
- Non-DSpace migrating repository (one in second cohort)

We will seek to include institutions that range in size and location with at least one institution that operates French.



### Expected scope of project

- Repository migration
- Workflow documentation
- Service development
- Identification of policy needs

### Expected outcomes of the Early Adopter Program phase

- Production repository on Scholaris Portal infrastructure for each participating institution
- Service definition
- Migration Workflow definition
- Service Policy Gap Analysis
- Shared integration, customization and preservation roadmap
- Cost estimation for ongoing service

### Requirements to participate

- Project agreement signed by regional consortia on behalf of participating institution
- Commitment to planning and migration period
  - Cohort 1: April through July 2024
  - Cohort 2: September through January 2025
- Commitment to participate in an Early Adopters group and/or project-related expert groups (e.g. Metadata and Discovery Expert Group)
- Seed funding to support migration and service development:

Instance Set Up		Migration Support	
Basic Setup	\$6,000	DSpace-simple	\$10,000
Preservation	\$1500	DSpace-complex	\$15,000
DOI-Support	\$1500	DSpace-highly complex	\$20,000
SSO-Support	\$1500	Non DSpace	\$20,000

For more information about projected service pricing and what factors define migration complexity, please reach out to the Scholaris team at [info@scholaris.ca](mailto:info@scholaris.ca).

### Deadline to express interest

Please formally express your interest by completing [this form](#) by March 29, 2024.

If you need a little more time or would like to meet and discuss participation before formally submitting, please get in touch at [info@scholaris.ca](mailto:info@scholaris.ca).